



Arizona Department of Health Services

Bureau of Nutrition and Physical Activity

HANDS WIC System

Detailed Functional Design Document

Commodity Supplemental Food Program

January 5, 2016

Version 1.1

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REVISION HISTORY

The chart below indicates revisions made to this document:

<u>Version</u>	<u>Name</u>	<u>Brief Description of Change</u>	<u>Published</u>
1.0	Cecilia Romo-Thompson	Initial Draft	00-00-2014

1 OVERVIEW

This document is a detailed functional design document (DFDD) for the HANDS WIC System, concentrating on features associated with the available Commodity Supplemental Food Program (CSFP) features at the clinic level. The CSFP module can only be accessed by clinics that have CSFP set up in the System Administration.

1.1 Commodity Supplemental Food Program (CSFP) Features Summary

- Search for existing families/clients participating in CSFP
- Maintain family information
- Maintain client information
- Maintain income information for a participant
- Maintain certification information for a participant
- Maintain and update distribution information
- View appointment information for a family/participants
- View notes for participants
- Enroll a new family into CSFP
- Enroll a new client(s) into CSFP
- Record income for a family/participant(s) for CSFP
- Certify participants for the CSFP program
- Schedule appointments for a participant in CSFP
- Creates notes for a client record in CSFP

ROMOC [Log Off] 02 - COCHISE COUNTY HEALTH DEPARTMENT / 02 - BISBEE WIC

Home Sys Admin Ops Mgmt WIC Services **CSFP Services** Scheduling Farmers' Market Finance Vendor Program Integrity Reports

Search

☒ CLINIC
 ☐ AGENCY
 ☐ STATE
 ☐ ACTIVE
 ☐ PENDING / INACTIVE
 ☐ ALL

Client ID:
 Family ID:
 Last Name:
 First Name:
 MI:
 Gender: ☒ M ☐ F
 Client Category:

Date of Birth:
 Cert. Start Date:
 Cert. End Date:
 Auth. Rep. 1 Last Name:
 Auth. Rep. 1 First Name:
 Phone Number:

Client ID	Family ID	Client Name	Cat	Gender	Date of Birth	Status
No data to show						

Row count: 10

Schedule Appts Add a New Family Trans to WIC Trans Family Trans Client Out of State Trans Search New Search

Figure 1: CSFP Services

2 CSFP SEARCH

The Search page allows searching for existing participants in the CSFP prior to entering new data into the system. The search page offers multiple options for search criteria and also allows the user to search their clinic, agency, or state for participants.

Navigation Path: CSFP Services / Search

The screenshot displays the CSFP Search interface. At the top, there is a navigation bar with links: Home, Sys Admin, Ops Mgmt, WIC Services, CSFP Services (highlighted), Scheduling, Farmers' Market, Finance, Vendor, Program Integrity, and Reports. Below this is a search bar and filter buttons for CLINIC, AGENCY, STATE, ACTIVE, PENDING / INACTIVE, and ALL. The search filters section includes fields for Client ID, Family ID, Last Name (SMITH), First Name (JOHN), MI, Gender (M/F), Client Category, Date of Birth, Cert. Start Date, Cert. End Date, Auth. Rep. 1 Last Name, Auth. Rep. 1 First Name, and Phone Number. Below the filters is a table with one row showing search results for Client ID 2021402971, Family ID 150000003, and Client Name SMITH, JOHN. The table also shows Cat (E3), Gender (M), Date of Birth (1/31/1947), and Status (A). Below the table is a 'Details' section with a table showing client information: Auth. Rep. 1 Name (SMITH, JOHN), Phones ((520) 555-1212), Cert. Dates (11/12/2014 - 4/30/2015), EDD (N/A), ADD (N/A), Local Agency (COCHISE COUNTY HEALTH DEPARTMENT), Clinic (BISBEE WIC), and Mail. Address (1234 MAIN STREET #7, BISBEE, AZ, 85603). At the bottom, there is a row count of 10 and a 'Showing 1-1 of 1' indicator. Below the details section are buttons for Schedule Appts, Add a New Family, Trans to WIC, Trans Family, Trans Client, Out of State Trans, Search, and New Search.

Figure 2: CSFP Search

Fields:

- **Client ID** – This field narrows the search results by Client ID
- **Family ID** – This field narrows the search results by Family ID
- **Last Name** – This field narrows the search results by client last name
- **First Name** – This field narrows the search results by client first name
- **MI** – This field narrows the search results by client middle initial
- **Client Category** – This drop down list narrows the search results by client category
- **Date of Birth** – This field narrows the search results by client date of birth
- **Cert. Start Date** – This field narrows the search results by the certification start date
- **Cert. End Date** – This field narrows the search results by the certification end date
- **Auth. Rep. 1 Last Name** – This field narrows the search results by the Authorized Representative 1 last name
- **Auth. Rep. 1 First Name** – This field narrows the search results by the Authorized Representative 1 first name
- **Phone Number** – This field narrows the search results by the phone number

Fields (Results Grid):

- **Client ID** – A unique, system generated identification number for the client. This field is displayed as a link that will navigate the user to the Client page. A symbol of a D will display next to this field for deceased clients.
- **Family ID** – A unique, system generated identification number for the family. This field is displayed as a link that will navigate the user to the Family page.
- **Client Name** – The name of the client listed by Last Name, First Name. This field is display only. The text in this field is bold and red for deceased clients.
- **Category** – The category that the client belongs to. This field is display only.
- **Gender** – The gender of the client. This field is display only.
- **Date of Birth** – The birth date of the client. This field is display only.
- **Status** – The status of the client. This field is display only.






Fields (Results Grid – Expanded Row):

- **Auth. Rep. 1 Name** – The name of the Authorized Representative 1 displayed by Last Name, First Name. This field is display only.
- **Phones** – The phone number for the authorized representative. This field is display only.
- **Cert. Dates** – The cert dates for the client. This field is display only.
- **EDD** – The Expected Delivery Date for the client (if applicable). This field is display only.
- **ADD** – The Actual Delivery Date for the client (if applicable). This field is display only.
- **Local Agency** – The local agency the client is registered in. This field is display only.
- **Clinic** – The clinic the client is registered in. This field is display only.
- **Mail. Address** – The mailing address for the family. This field is display only.

Checkboxes:

- **Clinic/Agency/State** – Selection options to search by clinic, agency, or statewide
- **Active/Pending/Inactive/All** – Selection options to search by active, pending, inactive, or all clients
- **Gender M/F** – Selection options to search by gender

Buttons:

-  (**Previous Page**) – Show the previous page of results
-  (**Next Page**) – Show the next page of results
-  (**First Page**) – Show the first page of results
-  (**Last Page**) – Show the last page of results
-  **Row Count** – Expands the displayed rows in the search results (10, 25, 50)
- **Schedule Appts.** – Navigates to the Appointment Scheduler
- **Add a New Family** – Navigates to a blank Family page
- **Trans to WIC** – Initiates the process to transfer a selected client to the WIC program
- **Trans Family** – Initiates the process to transfer a selected family into the logged in clinic
- **Trans Client** – Initiates the process to transfer a selected client into the logged in clinic
- **Out of State Trans** – Initiates the out of state transfer process

- **Search** – Initiates a search based on the search criteria entered
- **New Search** – Clears all search criteria from the search fields

Calculation(s): None

Background Processes:

- 1) Searching by a phone number will return all Client records that match the phone number entered. The query will look at all numbers entered for families if multiple exist.
- 2) Users logged in at the State Agency or Local Agency level will be able to view all Client and Family records throughout the system in a “view only” state. Users logged in at the Clinic level will only be able to access those Client and Family records located in their Clinic. However, by using the Agency/Clinic/Statewide buttons the user will have access to all Client and Family records throughout the system.
- 3) For partial match searches, the ‘wildcard’ will be assumed on the end of the search. A “starts with” process will be on each field. If a query is executed and no matches are found, the criteria entered remains on the screen, the cursor remains in the criteria field, and the results section of the screen display a “No data to show” message. If no criteria are entered and the query is executed, the system retrieves all Clients in the database.

2.1 Transfer to WIC

Navigation Path: CSFP Services / Search / Trans to WIC Button

ROMOC [Log Off] 02 - COCHISE COUNTY HEALTH DEPARTMENT / 02 - BISBEE WIC

Home Sys Admin Ops Mgmt WIC Services CSFP Services Scheduling Farmers' Market Finance Vendor Program Integrity Reports

Search

CLINIC AGENCY STATE ACTIVE PENDING / INACTIVE ALL

Client ID Family ID Last Name First Name MI Gender Client Category

Date of Birth Cert. Start Date Cert. End Date Auth. Rep. 1 Last Name Auth. Rep. 1 First Name Phone Number

	Client ID	Family ID	Client Name	Cat	Gender	Date of Birth	Status
<input checked="" type="checkbox"/>	2021402968	150000001	TESTY5, MOM	PG2	F	11/1/1991	A
<input type="checkbox"/>	2021402969	150000001	TESTY5, SON	C3	M	12/15/2010	A
<input type="checkbox"/>	2021402599	149993901	TESTY5, MOMMY	PG2	F	1/31/1990	P
<input type="checkbox"/>	2021402600	149993901	TESTY5, SON	C2	M	5/27/2012	P

<< < > >> Row count: 10 Showing 1-4 of 4

Transfer Client

Do you want to transfer this client 2021402968 to the WIC Program ?

OK Cancel

Schedule Appts Add a New Family Trans to WIC Trans Family Trans Client Out of State Trans Search New Search

Figure 2.1: Transfer to WIC

Message Box Text:

- **Do you want to transfer this client <Client ID> to the WIC Program?**

Buttons:

- **OK** – The client is transferred to the WIC Program. The Confirmation notification appears.

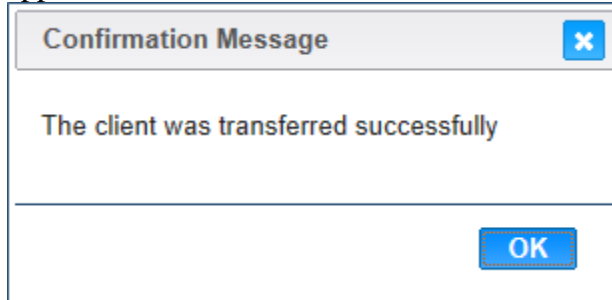




Figure 2.2: Transfer Confirmation Message

- **OK** – The Confirmation notification is closed
-  **(Close Window)** – The Confirmation notification is closed
- **Cancel** – No action is taken
-  **(Close Window)** – The window is closed and no action is taken

Calculation(s): None

Background Processes:

- 1) The Program code for the client will change from C to W.
- 2) If the client is certified in CSFP, then the certification will be terminated with the reason code '6 – CURRENTLY PARTICIPATING IN WIC'.

2.2 Transfer Family

Navigation Path: CSFP Services / Search / Trans Family Button

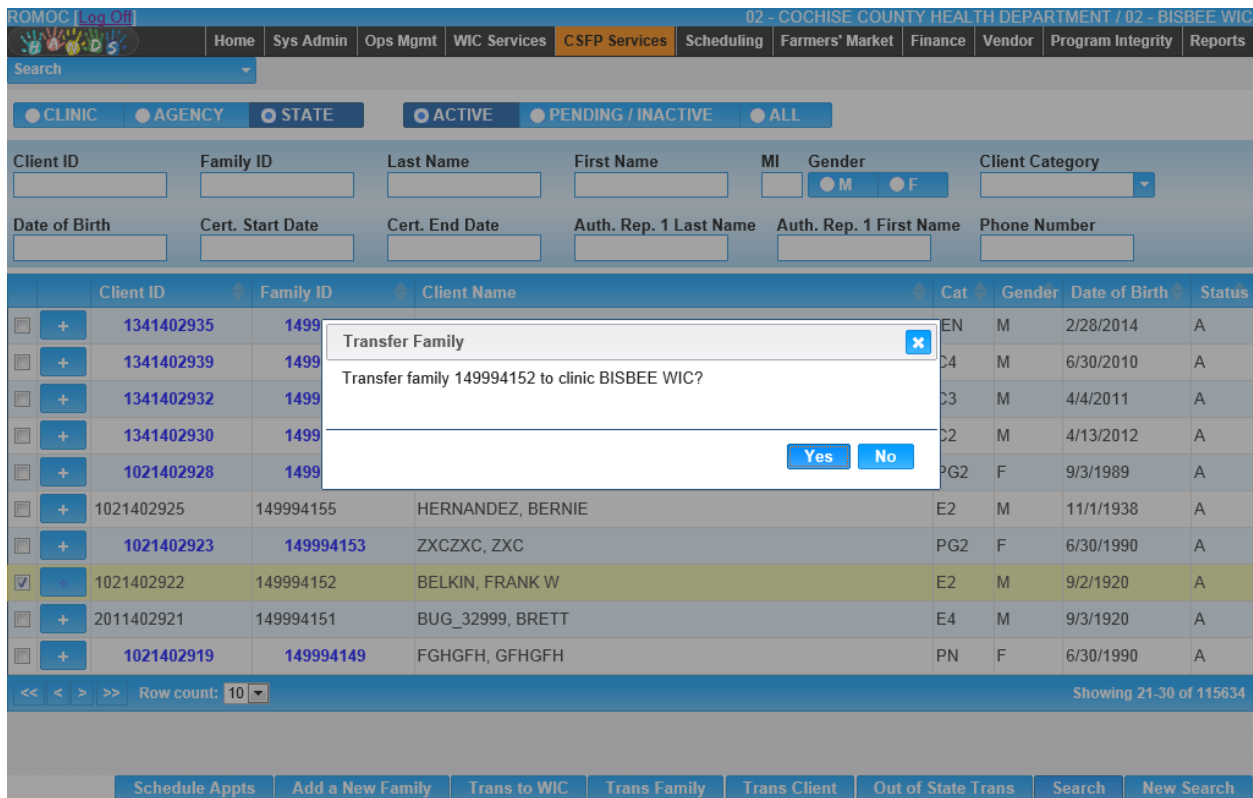


Figure 2.3: Transfer Family

Message Box Text:

- **Transfer family <Family ID> to clinic <Logged in clinic>?**

Buttons:

- **Yes** – Completes the family transfer

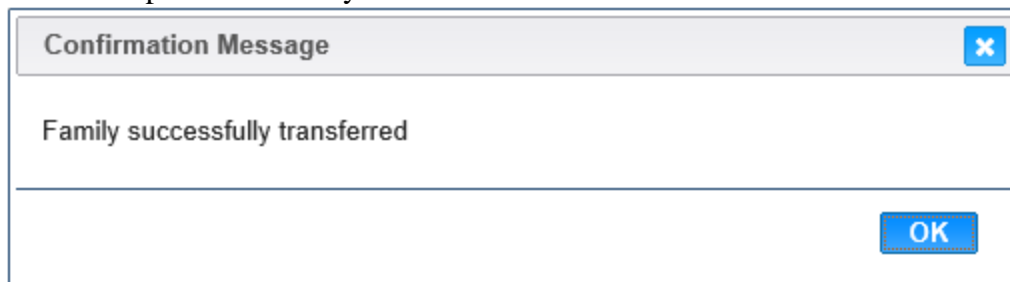


Figure 2.4: Transfer Family Confirmation Message

- **OK** – The Confirmation notification is closed
- **X (Close Window)** – The Confirmation notification is closed
- **No** – Transfer is not completed
- **X (Close Window)** – The window is closed and no action is taken.

Calculation(s): None

Background Processes:

- 1) All future appointments for clients in this family will be deleted.
- 2) Breast pump inventory record will be updated to have the new Clinic ID if any of the client(s) in this family has a breast pump with the status Issued or Letter Sent.
- 3) Client's current breast pump issuance record, if any, will be updated to have new Clinic ID.

2.3 Transfer Client

Navigation Path: CSFP Services / Search / Trans Client Button

The screenshot displays the ROMOC system interface. At the top, there's a navigation bar with tabs: Home, Sys Admin, Ops Mgmt, WIC Services, CSFP Services (selected), Scheduling, Farmers' Market, Finance, Vendor, Program Integrity, Reports. Below this is a search bar and filter buttons for CLINIC, AGENCY, STATE, ACTIVE, PENDING / INACTIVE, and ALL. A form section contains fields for Client ID, Family ID, Last Name, First Name, MI, Gender (M/F), Client Category (E3), Date of Birth, Cert. Start Date, Cert. End Date, Auth. Rep. 1 Last Name, Auth. Rep. 1 First Name, and Phone Number. Below the form is a table of search results. The first row is highlighted, and a 'Transfer Client' dialog box is overlaid on it. The dialog contains the text: 'Do you want to transfer this client 2021402971 to a new family or an existing family?' and three buttons: 'New Family', 'Existing Family', and 'Cancel'.

	Client ID	Family ID	Client Name	Cat	Gender	Date of Birth	Status
<input checked="" type="checkbox"/>	2021402971	15000000		E3	M	1/31/1947	A
<input type="checkbox"/>	1021402911	1499		E3	M	9/3/1938	A
<input type="checkbox"/>	1021402910	1499		E3	F	9/3/1950	A
<input type="checkbox"/>	1021402858	1499		E3	F	9/3/1928	A
<input type="checkbox"/>	1021402852	1499		E3	M	9/3/1910	A
<input type="checkbox"/>	1021402828	149994085	BUG_34351, GAVIN W	E3	M	9/3/1930	A
<input type="checkbox"/>	1021402816	149994073	BUG_34415, JANE W	E3	F	9/3/1947	A
<input type="checkbox"/>	1021402805	149994063	SMOKE57, JEFF W	E3	M	9/3/1910	A
<input type="checkbox"/>	1021402763	149994030	SMOKE56, REGGI W	E3	M	9/3/1921	A
<input type="checkbox"/>	1021402764	149994030	SMOKE56, NANCY W	E3	F	9/3/1921	A

Row count: 10 Showing 1-10 of 40

Buttons: Schedule Appts, Add a New Family, Trans to WIC, Trans Family, Trans Client, Out of State Trans, Search, New Search

Figure 2.5: Transfer Client

Message Box Text:

- **Do you want to transfer this client <Client ID> to a new family or an existing family?**

Buttons:

- **New Family** – Initiates the process to transfer the client into a new family. A blank family page will display to enter the new family information.
- **Existing Family** – Initiates the process to transfer the client into an existing family

ROMOC [Log Off] 02 - COCHISE COUNTY HEALTH DEPARTMENT / 01 - DOUGLAS HEALTH

Home Sys Admin Ops Mgmt WIC Services CSFP Services Scheduling Farmers' Market Finance Vendor Program Integrity Reports

Back to List

Family Search

Family ID Authorized Rep Last Name Authorized Rep First Name

149994063

Family ID	Authorized Rep Last Name	Authorized Rep First Name
149994063	SMOKE57	LISA

<< < > >> Row count: 10 Showing 1-1 of 1

Transfer Client Search New Search

Figure 2.6: Family Search

- **Family ID** - This field will narrow down the search results by Family ID
- **Authorized Rep Last Name** – This field will narrow down the search results by Authorized Rep Last Name
- **Authorized Rep First Name** – This field will narrow down the search results by Authorized Rep First Name
- **Transfer Client** – Continues the client transfer process

Transfer Client:

Are you sure you want to transfer this client:
2021402971 to this Family: 149994063?

Transfer Client Cancel

Figure 2.7: Transfer Client Message

- **Transfer Client** – Continues the transfer process

Select Distribution Site

Distribution Site:

*Distribution Site

02 - BISBEE WIC

OK

Figure 2.8: Select Distribution Site

- **Distribution Site** – List of CSFP distribution sites
- **OK** – Continues the transfer process

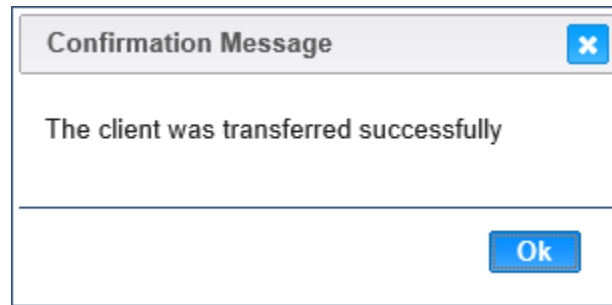



Figure 2.9: Transfer Confirmation Message

- **Cancel** – Transfer process is cancelled
- **Search** – Initiates the search based on the criteria entered
- **New Search** – Clears all search fields
- **Cancel** – The window is closed and no action is taken
-  **(Close Window)** – The window is closed and no action is taken.

Calculation(s): None

Background Processes:

1) Client income:

- For foster clients: If transferred, the foster client is part of the previous family income record, new income history record will be created with the client's previous family income details.
- For other clients: Client income details will be removed from previous family's income history record.

- 2) Client's future appointments will be deleted and client will be removed from any scheduled nutrition discussion groups.

2.4 Out of State Transfer

This page is used to transfer clients into the system from other states or to use an existing record from a client that was previously receiving services. Once the user is in the Out of State Transfer flow, all screens for all family members must be completed before navigating to another module. Once the user navigates to another module, they are no longer in the transfer flow and additional information may be required to add family members. In the Out of State Transfer flow, only the Family, Client and Certification pages are required.

Navigation Path: CSFP Services / Search / Out of State Trans Button

ROMOC [Log Off] 02 - COCHISE COUNTY HEALTH DEPARTMENT / 02 - BISBEE WIC

Home Sys Admin Ops Mgmt WIC Services CSFP Services Scheduling Farmers' Market Finance Vendor Program Integrity Reports

Family Client Income Cert Distribution Appts Notes FMNP Issuance FMNP Void / Reissue

Search

LA/Clinic
BISBEE WIC

Family ID
150000003

Auth. Rep. Name
SMITH, JOHN

Phone
(520) 555-1212

Client ID
2021402997

Client Name
SMITH, JOHN

Date of Birth
5/27/1941

Age
73 yrs, 6 mos

Cert. Period
N/A

Category
N/A

Term. Date
N/A

Due Date
N/A

Next Appt.
N/A

Weeks PG
N/A

Distribution Site
N/A

Out Of State Transfer Flow

*Last Name SMITH *First Name JOHN MI *Date of Birth 05/27/1941 Age 73 yrs, 6 mos Gender ☒ M ☐ F

Application Date 11/26/2014 *VOC *Proof Of Identity C - DRIVER'S LICENSE/STATE ID Disability

Has the child entered into foster care, or changed foster care homes, within the last 6 months?
☒ Foster Care ☐ Yes ☐ No

Ethnicity and Race

*Choose one of the following:
☒ Hispanic or Latino ☐ Not Hispanic or Latino

Origins
 Select options

*Choose one of the following:
☒ Provided by Client ☐ Observed by Staff

Staff Name
N/A

*Choose one or more of the following:
☐ American Indian or Alaskan Native
☐ Asian
☐ Native Hawaiian or Other Pacific Islander
☐ Black or African American
☒ White

Ineligibility Reason

Scanned Documents

Scan Title	Description	Scanned Date	Scanned By
No data to show			

Scan Document Signatures Print VOC Form Transfer Client Add Save Reset

Figure 2.10: Out of State Transfer

NOTE: If the client the user is trying to do an out of state transfer for is not in the clinic the user is logged into, a message will display informing the user to first complete and in-state transfer.

Out Of State Transfer [X]

The client you are attempting to certify with the Out of State Transfer is not in the clinic you are logged into. Please perform an Instate Transfer first.

OK

Figure 2.11: Out of State Transfer Message

If the client the user is trying to do an out of state transfer for is in an active certification, a message will display asking if they want to terminate the certification.


Out Of State Transfer [X]

This action cannot be performed when the client is in an active certification. Do you wish to terminate the current certification ?

Yes No

Figure 2.12: Out of State Transfer Message

Buttons:

- **Yes** – Terminates the current certification
- **No** – Keeps the current certification and no action is taken
-  **(Close Window)** – The window is closed and no action is taken.

Calculation(s): None

Background Processes:

- 1) If the client has a valid current certification, it will be terminated and the client's record status is set to Inactive (I).
- 2) If any VOC value exists, it will be cleared from client's record.

3 FAMILY PAGE

The CSFP Family page is used to enter demographic information for a family, such as address and phone numbers. The completion and saving of this page will generate a unique Family ID for that family.

Navigation Path: CSFP Services / Add a New Family Button / Family Information

The screenshot displays the 'Family Information' page in the HANDS WIC System. The interface includes a top navigation bar with links like 'Home', 'Sys Admin', 'Ops Mgmt', 'WIC Services', 'CSFP Services', 'Scheduling', 'Farmers' Market', 'Finance', 'Vendor', 'Program Integrity', 'Reports', and 'Help'. Below this is a sub-navigation bar with 'Family', 'Client', 'Income', 'Cert', 'Distribution', 'Appts', 'Notes', 'FMNP Issuance', and 'FMNP Void / Reissue'. The main form area is divided into several sections:

- Family Information:** A sidebar on the left shows 'LA/Clinic: DOUGLAS WIC', 'Family ID: 160038807', 'Auth. Rep. Name: TEST, JOHN', and 'Phone: (520) 555-1212'. A button 'TEST, JOHN' is at the bottom.
- Authorized Representative 1:** Fields for Last Name (TEST), First Name (JOHN), MI, Proof Of Identity (C - DRIVER'S LICENSE/STATE ID), Register To Vote? (CR - CURRENTLY REGISTERED), Disability, Proof Of Address (5 - DRIVER'S LICENSE), and Email Address.
- Authorized Representative 2:** Similar fields for Last Name, First Name, MI, Proof Of Identity, Register To Vote?, Disability, Proof Of Address, and Email Address.
- Street Address:** Fields for Street 1 (1234 MAIN STREET), Street 2 (#3), and City, State, ZIP Code, and County (DOUGLAS, AZ 85608 COCHISE). A checkbox 'Do Not Send Mailings' is present.
- Mailing Address:** Fields for Street 1 (1234 MAIN STREET), Street 2 (#3), and City, State, ZIP Code, and County (DOUGLAS, AZ 85608 COCHISE). A checkbox 'Copy Street To Mailing' is present.
- Family Phone(s):** A table with columns: Phone Number, Ext., Phone Type, Do Not Call, Do Not Text, Priority. One entry is shown: (520) 555-1212, HP - HOME PHONE, Primary.
- Appointment Reminder Preference:** Radio buttons for Phone, Email, and Text.
- Languages:** Fields for Primary Language (1 - ENGLISH) and Secondary Language, with an 'Interpreter Required' checkbox.
- Proxy 1 and Proxy 2:** Fields for Last Name, First Name, MI, and Proof Of Identity.
- How did you hear about CSFP?:** A dropdown menu.
- Table:** A table with columns: Date, Program, Organization. It shows 'No data to show'.

At the bottom of the form are buttons: 'Print Proxy Form', 'Signatures', 'Data Sharing', 'New Client', 'Save', and 'Reset'.

Figure 3: Family Information Page

Fields:

- **Clinic** – Drop down list populated with a list of clinics. This field is mandatory

Authorized Representative 1

- **Last Name** – Free text field for Authorized Rep 1 last name. This field is mandatory.
- **First Name** – Free text field for Authorized Rep 1 first name. This field is mandatory.

- **MI** – Free text field for Authorized Rep 1 middle initial. This field is optional.
- **Proof of Identity** – Drop down list populated with proof of identity values. This field is mandatory.
- **Register to Vote** – Drop down list populated with register to vote values. This field is mandatory.
- **Disability** – Drop down list populated with disability values. This field is optional.
- **Proof of Address** – Drop down list populated with proof of address values. This field is mandatory.
- **Email Address** – Free text field for email address. Must be in proper email format. This field is optional.

Authorized Representative 2

- **Last Name** – Free text field for Authorized Rep 2 last name. This field is optional unless First Name or MI is filled in.
- **First Name** – Free text field for Authorized Rep 2 first name. This field is optional unless Last Name or MI is filled in.
- **MI** – Free text field for Authorized Rep 2 middle initial. This field is optional unless Last Name or First Name is filled in.
- **Proof of Identity** – Drop down list populated with proof of identity values. This field is optional unless Authorized Representative 2 Last Name and First Name is filled in.

Street Address

- **Street 1** – Free text field for street address. This field is mandatory.
- **Street 2** – Free text field for line 2 of street address. This field is optional.
- **City, State, Zip Code, and County** – Predictive text field based on city or zip code. This field is mandatory.

Mailing Address

- **Street 1** – Free text field for street address. This field is mandatory.
- **Street 2** – Free text field for line 2 of street address. This field is optional.
- **City, State, Zip Code, and County** – Predictive text field based on city or zip code. This field is mandatory.

Family Phones Grid

- **Phone Number** – Phone number entered for the family. This field is display only.
- **Ext.** – Extension for the phone number entered. This field is display only.
- **Phone Type** – Type of phone number entered. This field is display only.
- **Do Not Call** – Checkbox checked/unchecked for family. This field is display only.
- **Do Not Text** – Checkbox checked/unchecked for family. This field is display only.
- **Priority** – Primary/Secondary/Other displayed for family. This field is display only.

Languages

- **Primary Language** – Drop down list populated with language values. This field is mandatory.
- **Secondary Language** – Drop down list populated with language values. This field is optional.

Proxy 1

- **Last Name** – Free text field for proxy 1 last name. This field is optional unless First Name, MI, or Proof of Identity is filled in.

- **First Name** – Free text field for proxy 1 first name. This field is optional unless Last Name, MI, or Proof of Identity is filled in.
- **MI** – Free text field for proxy 1 middle initial. This field is optional.
- **Proof of Identity** – Drop down list populated with proof of identity options for Proxy 1. This field is optional unless Last Name, First Name, or MI is filled in.

Proxy 2

- **Last Name** – Free text field for proxy 2 last name. This field is optional unless First Name, MI, or Proof of Identity is filled in.
- **First Name** – Free text field for proxy 2 first name. This field is optional unless Last Name, MI, or Proof of Identity is filled in.
- **MI** – Free text field for proxy 2 middle initial. This field is optional.
- **Proof of Identity** – Drop down list populated with proof of identity options for Proxy 2. This field is optional unless Last Name, First Name, or MI is filled in.
- **How did you hear about CSFP?(grid)**
 - **Date** – Date question was answered and entered. This field is display only.
 - **Program** – Program name for question answered. This field is display only.
 - **Organization** – Organization name for question answered. This field is display only.

Buttons:

- **Do Not Email** – Indicates whether or not the client wishes to receive email.
- **Do Not Send Mailings** – Indicates whether or not the client wishes to receive mail.
- **Copy Street to Mailing** – Copies the street address to the mailing address.
- **Does Not Have a Phone** – Indicates the client does not have a phone.
- **Add in (phone grid)** – Initiates the process to add a phone number.

The screenshot shows a dialog box titled "Add" with a close button (X) in the top right corner. The dialog contains the following elements:

- *Phone Number**: A yellow text input field.
- Ext.**: A white text input field.
- *Phone Type**: A yellow dropdown menu.
- Do Not Call**: A blue button with a white square icon, currently checked.
- Do Not Text**: A light blue button with a white square icon, currently unchecked.
- *Priority**: Three blue buttons with white radio icons labeled "Primary", "Secondary", and "Other".
- OK** and **Cancel**: Two blue buttons at the bottom right.

Figure 3.1: Add Phone Number

- **Phone Number** – Free numerical text field for phone number. This field is mandatory.
- **Ext.** – Free numerical text field for phone extension. This field cannot be more than 5 digits and is optional.
- **Phone Type** – Drop down list of phone type values. This field is mandatory.
- **Do Not Call** – Indicates whether or not the client wants to receive phone calls.
- **Do Not Text** – Indicates whether or not the client wants to receive text messages.
- **Priority** – Indicates if the phone number is Primary/Secondary/Other. At least one phone number must be the Primary phone. This field is mandatory.
- **OK** – Completes the add phone process.
- **Cancel** – Closes the window without saving phone information.
- **Appointment Reminder Preference** – Indicates appointment reminder preference. Available options are based on phone types entered. This field is optional.
- **Interpreter Required** – Indicates if an interpreter is required.
- **Add** – Initiates the process to add how client heard about CSFP.
- **Print Proxy Form** – Displays blank proxy form that can be printed.
- **Save** – Initiates save on the family page.
- **Reset** – Clears all fields that have not been previously saved.
- **Cancel** – Closes the family page with no action.

Buttons After Save:

- **Signatures** – Initiates the signature pad functionality.
- **Data Sharing** – Initiates the Data Sharing page.

Navigation Path: CSFP Services tab / Client/Family Search / Edit a Family / Data Sharing button

ROMO [Logo] 02 - COCHISE COUNTY HEALTH DEPARTMENT / 01 - DOUGLAS WIC

Home Sys Admin Ops Mgmt WIC Services **CSFP Services** Scheduling Farmers' Market Finance Vendor Program Integrity Reports Help

Back To Family Information

LA/Clinic
DOUGLAS WIC

Family ID
160038807

Auth. Rep. Name
TEST, JOHN

Phone
(520) 555-1212

Client ID
1021501719

Client Name
TEST, JOHN

Date of Birth
1/31/1943

Age
72 yrs, 11 mos

Cert. Period
N/A

Category
N/A

Term. Date
N/A

Due Date
N/A

Next Appt.
N/A

Weeks PG
N/A

Distribution Site
N/A

Wait Listed On
N/A

Data Sharing Election:

Data sharing verified date: N/A

With your permission, the WIC program will share your information with other programs that may benefit your family.

Program	Share <input type="checkbox"/>	Do Not Share <input type="checkbox"/>
DOCTOR	<input type="checkbox"/>	<input type="checkbox"/>
COUNTY HEALTH DEPARTMENT	<input type="checkbox"/>	<input type="checkbox"/>
AHCCCS	<input type="checkbox"/>	<input type="checkbox"/>
SCHOOL LUNCH PROGRAM	<input type="checkbox"/>	<input type="checkbox"/>

Save Reset

▪ **Data Sharing Election Grid:**

- **Program** – Lists the program data may or may not be shared with.
- **Share** – Checkbox to select to share client information with this program.
- **Do Not Share** - Checkbox to select to not share client information with this program.

Buttons (Data Sharing Election Page)

- **Save** – Saves the information entered on the page.
- **Reset** – Press this button to return the page to its original state without any changes being saved.

Calculation(s): None

Background Processes:

- 1) A user may enter only one number with the priority of primary and one as secondary. As many numbers as desired may be entered that have a priority of other.
- 2) The phone appointment reminder preference option will be disabled if no phone number is listed or the do not call checkbox is checked for all numbers listed for the Family. The email option will be disabled if no email address is entered or the do not email checkbox is checked for the Family. The text option will be disabled if no number exists with the phone type of cell phone or the do not text checkbox is checked for the Family.
- 3) The majority of forms for Arizona will be in both English and Spanish. If populated while in a Client record, forms will populate in the primary language of the Family (Spanish or English only). If the primary language is something other than Spanish or English, the default language will be English. For more information, see the Forms section of this document.
- 4) The system performs a four step save process when saving a new Family:
 - a. First, it ensures all mandatory fields are populated with data. If not, the save process will stop and an error message will be thrown.
 - b. Second, it ensures all fields have proper data entered (i.e. Fields that only accept numbers do not allow alphabetic characters to be saved). If not, the save process will stop and an error message will be thrown.
 - c. Third, it ensures all fields do not exceed the maximum character amount allowed. If not, the save process will stop and an error message will be thrown.
 - d. Finally, after the other three steps have been completed successfully the system assigns a unique system generated Family ID to the Family and adds the Family data to the database. The Family ID format is FY9999999. The first two digits are dependent on the fiscal year from the Budgeting Factors table. The remaining seven digits are a unique system generated sequence that is incremented by one after each new Family creation. For more information, see the Budgeting Factors section of the FNS-798 DFDD.

NOTE: If the Budgeting Factor table for the current fiscal year is not configured the creation of the Family ID will fail.

- 5) Register to vote? Selection will be cleared if there are any edits to Street Address or Mailing Address.
- 6) If the family's primary language is not '1 – English', the 'Interpreter required' checkbox will be enabled.
- 7) Auth. Rep proof of Identity will be cleared if there are any changes to Auth. Rep name.

4 CLIENT PAGE

The CSFP Client page is used to enter demographic information for a client, such as name and date of birth. The completion and saving of this page will generate a unique Client ID for that client.

Navigation Path: CSFP Services / Client Page

The screenshot displays the 'Client Page' in the HANDS WIC System. The top navigation bar includes links like Home, Sys Admin, Ops Mgmt, WIC Services, CSFP Services, and others. The left sidebar shows 'Client Information' with details for Jason Smith, including his Family ID (140000010), Auth. Rep. Name (SMITH, JASON), Phone ((555) 122-1212), Client ID (2021402982), and Client Name (SMITH, JASON). The main form area contains fields for *Last Name (SMITH), *First Name (JASON), MI (), *Date of Birth (01/31/1943), Age (71 yrs, 9 mos), Gender (M), Application Date (11/18/2014), VOC (N/A), *Proof Of Identity (C - DRIVER'S LICENSE/STATE ID), Disability (), Foster Care status (No), Ethnicity and Race (White), and an Ineligibility Reason dropdown. At the bottom, there is a 'Scanned Documents' table and buttons for Scan Document, Signatures, Print VOC Form, Transfer Client, Add, Save, and Reset.

Figure 4: Client page

Fields:

- **Last Name** – Free text field for client last name. This field is mandatory.
- **First Name** – Free text field for client first name. This field is mandatory.
- **MI** – Free text field for client middle initial. This field is optional.
- **Date of Birth** – Date field for client date of birth. This field is mandatory.

The screenshot shows a modal dialog box titled 'Verify Client's Birth Date'. The text inside reads: 'Ask the Authorized Rep: Is Client's birthdate January 31, 1943?'. At the bottom right, there are two buttons: 'Yes' and 'No'.

Figure 4.1: Verify Date of Birth Message

- **Yes** – Confirms the birth date

- **No** – Clears the Date of birth field for user to enter a new date
- **Age** – Age of the client. This field is display only.
- **Gender** – M/F indicator used to indicate gender of the client. This field is mandatory.
- **Application Date** – The date the client applied. Defaults to current date.
- **VOC** – VOC number. This field is display only unless the user is in the Out of State transfer workflow.
- **Proof of Identity** – Drop down list prepopulated with proof of identity values. This field is mandatory.
- **Disability** – Drop down list prepopulated with disability values. This field is optional.
- **Has the child entered into foster care, or changed foster care homes, within the last 6 months?**
 - **Foster Care** – Selection indicates the client is in foster care.
 - **Yes** – Selection indicates the child entered into foster care, or changed foster care homes, within the last 6 months.
 - **No** – Selection indicates the child has not entered into foster care, or changed foster care homes, within the last 6 months.

Ethnicity and Race:

- **Choose one of the following (at least one selection is mandatory):**
 - **Hispanic or Latino** – Selection indicates client is Hispanic or Latino
 - **Not Hispanic or Latino** – Selection indicates client is not Hispanic or Latino
- **Origins** – Multi-select drop down list populated with origin values
- **Choose one of the following (at least one selection is mandatory):**
 - **Provided by Client** – Selection indicates information provided by the client
 - **Observed by Staff** – Selection indicates information is observed by staff member
- **Staff Name** – User name who created the client. This field is display only.
- **Choose one or more of the following (at least one selection is mandatory):**
 - **American Indian or Alaskan Native** – Selection indicates client is American Indian or Alaskan Native
 - **Asian** – Selection indicates client is Asian
 - **Native Hawaiian or Other Pacific Islander** – Selection indicates client is Native Hawaiian or Other Pacific Islander
 - **Black or African American** – Selection indicates client is Black or African American
 - **White** – Selection indicates client is White
- **Ineligibility Reason** – Drop down list populated with ineligibility reason values
- **Scanned Documents (grid – all fields are display only):**
 - **Scan Title** – Displays the title of a scanned document
 - **Description** – Displays the description of a scanned document
 - **Scanned Date** – Displays the scanned date of a scanned document
 - **Scanned by** – Displays the user name of the person that scanned the document

Buttons:

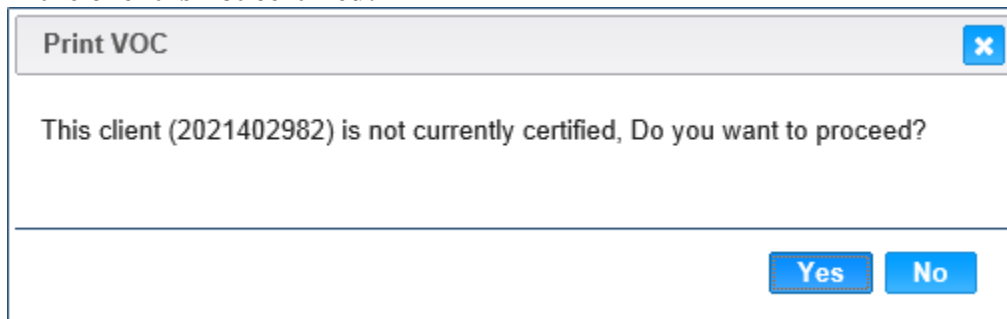
- **Save** – Initiates save of the information entered on the page
- **Reset** – Clears all fields that have not been previously saved

- **Cancel** – Closes the client page with no action

Buttons After Save:

- **Scan Document** – Redirects to the scanning page
- **Signatures** – Redirects to the signature page
- **Print VOC Form** – Initiates the process to print the VOC form

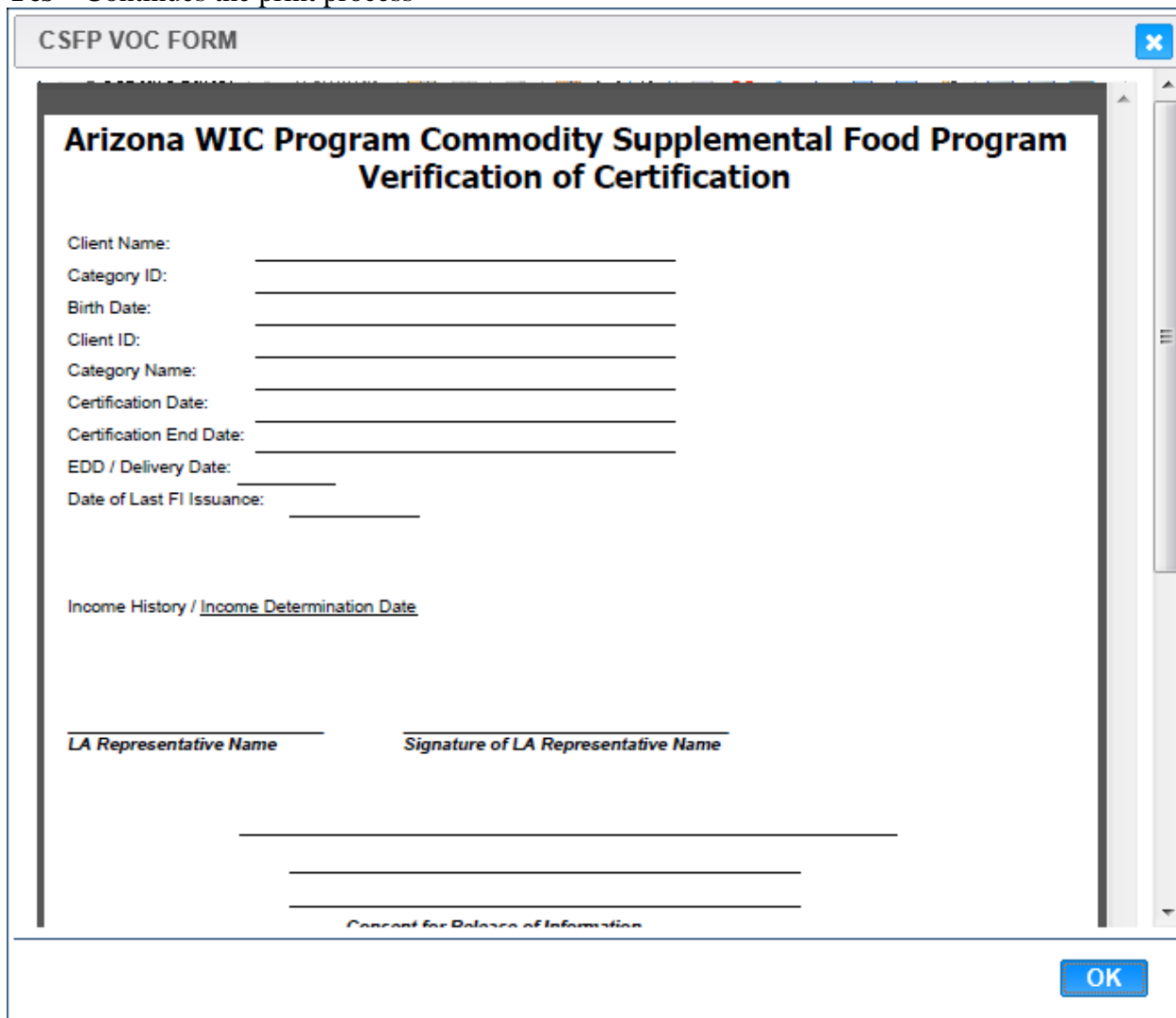
If the client is not certified:



A dialog box titled "Print VOC" with a close button (X) in the top right corner. The main text reads: "This client (2021402982) is not currently certified, Do you want to proceed?". At the bottom right, there are two buttons: "Yes" and "No".

Figure 4.2: Print VOC Message

Yes – Continues the print process

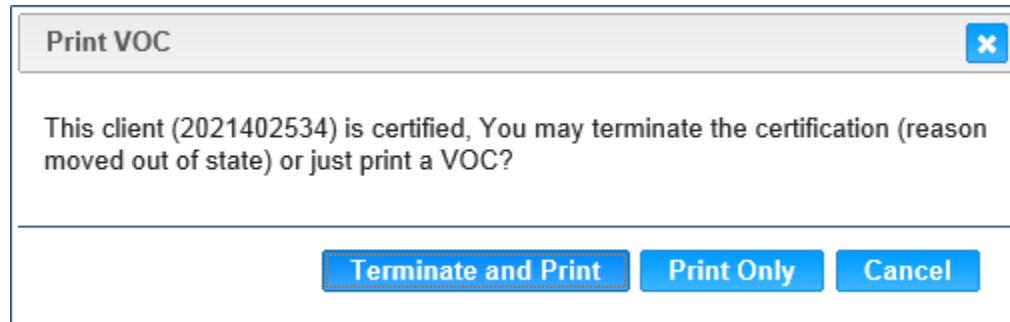


A screenshot of the "CSFP VOC FORM" window. The title bar says "CSFP VOC FORM" with a close button (X). The form content is titled "Arizona WIC Program Commodity Supplemental Food Program Verification of Certification". It contains several input fields for client information: Client Name, Category ID, Birth Date, Client ID, Category Name, Certification Date, Certification End Date, EDD / Delivery Date, and Date of Last FI Issuance. Below these is a section for "Income History / Income Determination Date". At the bottom, there are lines for "LA Representative Name" and "Signature of LA Representative Name", followed by a line for "Consent for Release of Information". An "OK" button is located in the bottom right corner.

Figure 4.3: VOC Form

OK – Closes the window with no action

If client is certified:

*Figure 4.4: Print VOC Message*

Terminate and Print – Automatically terminates the client and continues VOC print process

Print Only – Continues VOC print process

Cancel – Closes the window and no action is taken

No – Closes the window with no action

- **Transfer Client** – Initiates the client transfer process (*Refer to Transfer client Section 2..3*)
- **Add** – Initiates the add client process
- **Save** – Saves any information added/changed from the previous save

Calculation(s):

- 1) The age field will populate with the calculated number of years followed by the number of months based on the number of days between the Client's date of birth and today. The number of days for the Client's age will be rounded down to the nearest month (i.e. Client is 2 years, 3 months and 25 days old. The age field will display 2 yrs, 3 mos).

Background Processes:

- 1) The system performs a six step save process when saving a new Client:
 - a. First, it ensures all mandatory fields are populated with data. If not, the save process will stop and an error message will be thrown.
 - b. Second, it ensures all fields have proper data entered (i.e. Fields that only accept numbers do not allow alphabetic characters to be saved). If not, the save process will stop and an error message will be thrown.
 - c. Third, it ensures all fields do not exceed the maximum character amount allowed. If not, the save process will stop and an error message will be thrown.
 - d. Fourth, it ensures that the Client is eligible to be saved base on the Clients date of birth.
 - e. Fifth, it checks to see if the Client is a possible dual enrollment.

- f. Finally, after the other five steps have been completed successfully the system assigns a unique system generated Client ID to the Client and adds the Client data to the database. The Client ID format is CLLA99999999. The first two digits (CL) is the organizational code of the Clinic that the Client is being created in. The second two digits (LA) is the organizational code of the Local Agency that the Client is being created in. For more information on organizational codes, see the Organizational Units section of the Operations Management DFDD. The remaining seven digits are a unique system generated sequence that is incremented by one after each new Client creation. After the save process has been completed and the new Client has been assigned a Client ID, the Client will be within the Family record from which the process of creating a new Client was started. The user will be displayed on the new Clients, Client Information page.
- 2) For clients with age between 1 and 5 years, category (C1, C2, C3, C4, and C5) will be calculated and saved with the client record.
- 3) Duplicate client check is performed upon save. The following are the conditions used to check duplicate clients in the system:
 - a. Same Last name, matched up to 8 characters.
 - b. Same First name, matched up to 6 characters.
 - c. Same Middle Initial.
 - d. Same Gender.
 - e. Same birth year and birth month.

4.1 Scan Document Page

Navigation Path: CSFP Services / Client Page / Scan Document Button

The screenshot displays the 'Scan Document' page. At the top, a navigation bar includes 'ROMOC Log Off' and a breadcrumb trail: '02 - COCHISE COUNTY HEALTH DEPARTMENT / 02 - BISBEE WIC'. Below this is a menu with 'Home', 'Sys Admin', 'Ops Mgmt', 'WIC Services', 'CSFP Services' (highlighted), 'Scheduling', 'Farmers' Market', 'Finance', 'Vendor', 'Program Integrity', and 'Reports'. A 'Back To Client Information' button is located below the menu.

On the left, a sidebar contains client details for 'BISBEE WIC':

- Family ID: 140000010
- Auth. Rep. Name: SMITH, JASON
- Phone: (555) 122-1212
- Client ID: 2021402982
- Client Name: SMITH, JASON
- Date of Birth: 1/31/1943, Age: 71 yrs, 10 mos
- Cert. Period: 11/26/2014 - 10/31/2015, Category: E3
- Term. Date: N/A, Due Date: N/A
- Next Appt. 12/5/2014, Weeks PG: N/A
- Distribution Site: BISBEE WIC

The center of the page features a large, empty rectangular box with a blue border, intended for the scanned document.

On the right, there are three input fields:

- *Scan Title: A yellow text input field.
- Description: A larger text input field with a vertical scrollbar.
- Scanner Color Mode: Two radio buttons, 'Color' (selected) and 'Grayscale'.

At the bottom right, there are two buttons: 'Scan' and 'Save'.

Figure 4.5: Scan Document page

Fields:

- **Scan Title** – Free text field to enter a title of the document being scanned
This field is mandatory.
- **Description** – Free text field to enter comments.
This field is optional.
- **Scanner Color Mode** – Selection determines whether to scan in Grayscale or Color
This field is mandatory.

Buttons:

- **Scan** – Initiates the scan process
- **Save** – Initiates the save of the scanned document
- **Back to Client Information** – Directs user back to the Client page

Calculation(s): None

Background Processes:

- 1) Prior to saving, the system ensures all mandatory fields are populated with data. If not, the save process will stop and an error message will be thrown.

4.2 Signatures - Client Page

This page is used to collect client signatures.

Navigation Path: CSFP Services / Client Page / Signatures Button

The screenshot displays the 'Signatures' page within the HANDS WIC System. The top navigation bar includes links like 'Home', 'Sys Admin', 'Ops Mgmt', 'WIC Services', 'CSFP Services' (highlighted), 'Scheduling', 'Farmers' Market', 'Finance', 'Vendor', 'Program Integrity', and 'Reports'. A 'Back To Client Information' button is located below the navigation bar. On the left, a sidebar lists client details: LA/Clinic (BISBEE WIC), Family ID (140000010), Auth. Rep. Name (SMITH, JASON), Phone ((555) 122-1212), Client ID (2021402982), Client Name (SMITH, JASON), Date of Birth (1/31/1943), Age (71 yrs, 10 mos), Cert. Period (11/26/2014 - 10/31/2015), Category (E3), Term. Date (N/A), Due Date (N/A), Next Appt. (12/5/2014), Weeks PG (N/A), and Distribution Site (BISBEE WIC). The main content area features a signature capture box with the text 'I authorize the CSFP Staff to release my CSFP Verification of Certification.' and buttons for 'Clear' and 'OK'. To the right, there is a form with a '*Signature Type' dropdown (set to 'Verification Of Certification'), 'Family ID' (140000010), 'Client ID' (2021402982 - SMITH, JASON), and a 'Comment' text area. At the bottom right, there are 'Save' and 'Reset' buttons.

Figure 4.6: Signatures page

Fields:

- **Signature Type** – Drop down selection of type of signature to capture
- **Family ID** – A unique, system generated identification number for the family. This field is display only.
- **Client ID** – Drop down selection of a unique, system generated identification number for the client.
- **Comment** – Free text field for comments regarding the signature being captured.

Buttons:

- **Save** – Initiates the save process.
- **Reset** – Unsaved edits are cleared restoring the form to its previously unedited state.
- **Back to Client Information** – Redirects user to the Client page.

Calculation(s): None

Background Processes:

- 1) Prior to saving, the system ensures all mandatory fields are populated with data. If not, the save process will stop and an error message will be thrown

5 INCOME PAGE

This page is used to document income for CSFP Clients.

Navigation Path: CSFP Services / Income Page

ROMOC [Log Off] 02 - COCHISE COUNTY HEALTH DEPARTMENT / 02 - BISBEE WIC

Home Sys Admin Ops Mgmt WIC Services **CSFP Services** Scheduling Farmers' Market Finance Vendor Program Integrity Reports

Family Client **Income** Cert Distribution Appts Notes FMNP Issuance FMNP Void / Reissue

Income Eligibility

LA/Clinic
BISBEE WIC

Family ID
140000010

Auth. Rep. Name
SMITH, JASON

Phone
(555) 122-1212

Client ID
2021402982

Client Name
SMITH, JASON

Date of Birth
1/31/1943

Age
71 yrs, 9 mos

Cert. Period
N/A

Category
N/A

Term. Date
N/A

Due Date
N/A

Next Appt.
N/A

Weeks PG
N/A

Distribution Site
N/A

Household

Income Date
11/25/2014

*Family Size
1

Unborn Counted

Adjunct Eligibility

Members AHCCCS FOOD DISTRIBUTION PROGRAM FOOD STAMPS (SNAP) SUPPLE SECTION 8 TANF

Income

Providers + Add

Income Provider	Amount	Interval	Hours Per Week	Documentation	Monthly	
PRIMARY PROVIDER	\$600.00	M - MONTHLY		12-SOCIAL SECURITY BENEFITS LETTER	\$600.00	

Monthly Income Breakdown

Member	Monthly Income	Provider Details
SMITH, JASON	\$600.00	Details

Income Provider

Income Provider	Monthly Income
PRIMARY PROVIDER	\$600.00

Migrant

Signatures New Household Income Save Reset

Figure 5: Income page

Fields:

- **Income Date** – Date the income is recorded. This field defaults to the current date and is display only.
- **Family Size** – Numerical field for family size. This field is mandatory.
(Information Icon) with the mouse additional information will be displayed about what to enter as Family size. The Family size is used in the calculation to determine if the Client and or Family meet the requirements to be on the CSFP program.

Adjunct Eligibility Grid:

- **Adjunct eligibility is not used for CSFP clients.**

Income:

Providers Grid (fields are display only):

- **Income Provider** – Displays the name of the income provider.
- **Amount** – Displays the dollar amount of the income entered.
- **Interval** – Displays the interval of the income.
- **Hours Per Week** – Displays the hours per week of the income.
- **Documentation** – Displays the documentation provided for the income.
- **Monthly** – Displays the monthly amount for the entered income.
- **Edit Icon** – Select to edit the income provider entry.

- **Delete Icon** – Select to delete the income provider entry.

Monthly Income Breakdown Grid (fields are display only):

- **Member** – Displays the client name to which income is applied.
- **Monthly Income** – Displays the monthly amount to the client for the entered income.
- **Provider Details** – Select button to see provider and income details for the client.

Buttons:

- **Add (Provider Grid)** – Select to add a new income provider entry.

The screenshot shows a modal dialog box titled "Add". It contains the following elements:

- Zero Income:** A label followed by a blue button labeled "Yes".
- *Income Provider:** A label followed by a text input field containing the text "PRIMARY PROVIDER".
- *Amount:** A label followed by a text input field and a blue button labeled "Income Averaging".
- *Interval:** A label followed by a dropdown menu showing "A - ANNUALLY".
- Hours Per Week:** A label followed by a text input field.
- *Documentation:** A label followed by a dropdown menu.
- Family Members:** A label followed by a dropdown menu showing "Select options".
- Foster Children:** A label followed by a dropdown menu.
- Buttons:** "OK" and "Cancel" buttons at the bottom right.

Figure 5.1: Add Income Provider

- **Zero Income** – Selection to identify zero income for the client.
- **Income Provider** – Free text field for the name of the income provider, defaults to Primary Provider. This field is mandatory.
- **Amount** – Numerical field entry of the amount of income for the client. This field is mandatory.
- **Income Averaging** – Select to initiate the income averaging tool

Figure 5.2: Income Averaging

- **Interval** – Drop down selection of the payment interval.
- **Total** – The sum of the Amount fields. This field is display only.
- **Average** – The average of the Amount fields. This field is display only.
- **Amount** – Numerical field for the income amount.
- **Add Amount** – Select to add another amount field for averaging.
- **OK** – Select to close the window. The number displayed in the average field will be displayed in the amount field on the Add an Income page along with the interval entered.
- **Cancel** – Closes the window and no action is taken.
- **Interval** – Drop down selection of the payment interval. This field is mandatory.
- **Hours Per Week** – Numerical field for the hours per week the client works.
- **Documentation** – Drop down selection for the documentation used as proof of income. This field is mandatory.
- **Family Members** – Drop down multi-select of family members to apply income to.
- **Foster Children** – Drop down selection of what foster child to apply income to.
- **Signatures** – Redirects user to signature page to collect income related client signatures.
- **New Household Income** – Initiates process to add a new household income.
- **Save** – Initiates save of the income record.
- **Reset** - Unsaved edits are cleared restoring the form to its previously unedited state.

Checkboxes:

- **Unborn Counted** – Selection to indicate unborn child is counted in the family size.
- **Migrant** – Selection to indicate a migrant status of the family.

Calculation(s):

- 1) As the amount and interval for the income record are selected the system performs the following calculations to calculate the monthly amount for each income provider's record.
 - a. If the interval selected is annually then the system rounds the result received by dividing the number entered in the amount field by twelve.

- b. If the interval selected is weekly then the system rounds the result received by multiplying the number entered in the amount field by fifty-two and then dividing the result by twelve.
- c. If the interval selected is monthly then the system displays the number entered in the amount field.
- d. If the interval selected is bi-weekly then the system rounds the result received by multiplying the number entered in the amount field by twenty-six and dividing by twelve.
- e. If the interval selected is semi-monthly then the system rounds the result received by multiplying the number entered in the amount field by two.
- f. If the interval selected is hourly then the system rounds the result received by multiplying the number entered in the amount field by the number entered in the hourly field, then multiplying that result by fifty-two and then dividing the result by twelve.
- g. If the interval selected is quarterly then the system rounds the result received by dividing the number entered in the amount field by three.
- h. If the interval selected is semi-annually then the system rounds the result received by dividing the number entered in the amount field by six.

Background Processes:

- 1) The system performs a six step save process when saving a new income:
 - a. First, it ensures all mandatory fields are populated with data. If not, the save process will stop and an error message will be thrown.
 - b. Second, it ensures all fields have proper data entered (i.e. Fields that only accept numbers do not allow alphabetic characters to be saved). If not, the save process will stop and an error message will be thrown.
 - c. Third, it ensures all fields do not exceed the maximum character amount allowed. If not, the save process will stop and an error message will be thrown.
 - d. Fourth, it checks to see what statuses have been entered for the adjunct eligible programs if applicable.
 - e. Fifth, it ensures that the calculated monthly income amount is within an acceptable range for the CSFP program in regards to the Family's size.
 - f. Finally, after the other five steps have been completed without issue, the system will successfully save the page and add the data to the database. The user will only be able to edit the income record that day. It will become completely disabled after the End of Day process (For more information, see the EOD DFDD).
- 2) If the Client has forgotten proof of their income then the user will select the "10-Forgot Documentation" option from the documentation drop down list. A Client that does not have proof of income will have the forgot documentation icon displayed on their active record and will only be allowed a single month of issuance. The income record will not be locked until thirty days has past, after the thirty days the income record will become completely disabled. Additionally, the Things to Bring portion of the Appointments tab

for the Client will be populated with forgot documentation wording that is setup by the State Agency. For more information, see both the Appointment Scheduler and System Administration DFDDs.

- 3) If client(s) is over income then client's valid certification will be terminated with the reason 'B - NOT INCOME ELIGIBLE' upon income record save.
- 4) System prevents user from selecting Zero Income when one or more clients are participating in an adjunct program with or without proof.

6 CERTIFICATION PAGE

This page is used to certify a CSFP client for a period and category of eligibility. Besides assigning new certifications to a Client, this page is used for maintaining a Client's certification along with performing re-certifications. The user will also be able to extend and terminate a certification on this page.

Navigation Path: CSFP Services / Certification Pages

ROMOC [Log Off] 02 - COCHISE COUNTY HEALTH DEPARTMENT / 02 - BISBEE WIC

Home Sys Admin Ops Mgmt WIC Services **CSFP Services** Scheduling Farmers' Market Finance Vendor Program Integrity Reports

Family Client Income **Cert** Distribution Appts Notes FMNP Issuance FMNP Void / Reissue

Certification Action

LA/Clinic
BISBEE WIC

Family ID
140000010

Auth. Rep. Name
SMITH, JASON

Phone
(555) 122-1212

Client ID
2021402982

Client Name
SMITH, JASON

Date of Birth
1/31/1943

Age
71 yrs, 9 mos

Cert. Period
N/A

Category
N/A

Term. Date
N/A

Due Date
N/A

Next Appt.
N/A

Weeks PG
N/A

Distribution Site
N/A

*Distribution Site
LA/Clinic

*Category
N/A

Reason Client Not Present
N/A

Last Menstrual Period
N/A

Expected Delivery Date
N/A

Actual Delivery Date
N/A

Cert Start Date
11/26/2014

Cert End Date
N/A

Duration (Weeks)
N/A

Cert Created By
N/A

Termination Date
N/A

Wait List Flag
N/A

Rights & Obligations Rules & Regulations Education for Second Authorized Representatives

Disqualification Start Date
N/A

Disqualification End Date
N/A

Disqualification Reason
N/A

Certifications

Category	Cert Start Date	Cert End Date	Duration	Wait List	Client Present	Term. Date	Term. Reason	Created By
No data available!								

Print Reapply Form Print Rights & Obligations Signatures New Cert Save Reset

Figure 6: Certification page

NOTE: The entire certification action page will be disabled if the register to vote? (Family information page), proof of identity (Client information page), Data Sharing, and income collection date (Income page) have all not been saved today. Error messages (Figures 5.1, 5.2, 5.3 below) will be displayed at the top of the certification action page indicating what fields needs to be updated before the page can be used.

Insert/Update of Certification Records not allowed until Voter Registration information is updated on the Family Info screen.

Figure 6.1: Must update Voter Registration error message

Insert/Update of Certification Records not allowed until Proof of Identity information is updated on the Client Info screen.

Figure 6.2: Must update Client Proof of Identity error message

Income collection date must be today's date. Insert/update of certification records not allowed.

Figure 6.3: Must update Client Proof of Income error message


 **Insert/Update of Certification Records not allowed until data sharing information is updated on the Family Info screen.**

Figure 6.4: Must update Data Sharing error message

Fields:

- **Distribution Site** – Drop down list populated with distribution site values. This field is mandatory.
- **Category** – Drop down list populated with CSFP category values. This field is mandatory.
- **Reason Client Not Present** – Drop down list populated with reasons. This field is mandatory if Client Not Present checkbox is selected.
- **Last Menstrual Period** – Not used for CSFP and is disabled.
- **Expected Delivery Date** – Not used for CSFP and is disabled.
- **Actual Delivery Date** – Not used for CSFP and is disabled.
- **Cert Start Date** – Begin date of certification. This field defaults to the current date and is display only.
- **Cert End Date** – End date of certification. This field is calculated and is display only.
- **Duration (Weeks)** – Length of certification in weeks. This field is calculated and is display only.
- **Disqualification Start Date** – Begin date of disqualification. This field has data only if the client is disqualified and is display only.
- **Disqualification End Date** – End date of disqualification. This field has data only if the client is disqualified and is display only.
- **Disqualification Reason** – Reason client is disqualified. This field has data only if the client is disqualified and is display only.

Certifications Grid (Fields are display only):

- **Category** – Category of the certified client.
- **Cert Start Date** – Begin date of certification for client.
- **Cert End Date** – End date of certification for client.
- **Duration** – Length of certification in weeks.
- **Wait List** – Y/N indicator for client on wait list
- **Client Present** – Y/N indicator if client was present at certification
- **Term. Date** – Date certification was terminated. This field has data only if the client is terminated.
- **Term. Reason** – Reason client was terminated. This field has data only if the client is terminated.
- **Created By** – User name of who certified the client.

Checkboxes:

- **Client Not Present** – Selection indicating the client is not present. This enables the Reason Client Not Present drop down list.
- **Wait List Flag** – Selection indicating client is placed on the wait list.
- **Rights & Obligations** – Selection indicating Rights & Obligations were reviewed with the client.

- **Rules & Regulations** – Selection indicating Rules & Regulations were reviewed with the client.
- **Education for Second Authorized Representatives** – Selection indicating education given to Second Authorized Representative.

Buttons:

- **Print Reapply Form** – Initiates the form display for printing.

NOTICE TO REAPPLY

**COMMODITY SUPPLEMENTAL FOOD PROGRAM (CSFP)
NOTICE TO REAPPLY**

JASON SMITH
Participant's Name

1234 MAIN STREET
Address

2021402982
Identification Number

BISBEE, AZ 85603
City, State Zip

E3 - ELDERLY, NOT
HOMEBOUND, NOT
REC'V FS
Code Category

You were certified for this program on 11/26/2014 The last month in which you can pick up your food from this program will be In order to receive more food, you must apply again.

OK

Figure 6.4: Notice to Reapply Form

- **OK** – Closes the form
- **Print Rights & Obligations** – Initiates the form display for printing.

Rights & Obligations FORM

**Arizona Commodity Supplemental Food Program (CSFP)
Participant Rights and Obligations**

Family ID # 140000010

Our pledge to you

Supplemental Foods

- The CSFP provides you with a supplemental food box once a month
- The CSFP will make nutrition education available to all adult participants, and to authorized representatives of children

Fair Treatment

- The CSFP rules are the same for everyone
- You have the right to appeal decisions made by the CSFP about your eligibility

Privacy

- All the information provided to CSFP will be kept private

Help Getting Enrolled in Services

- If you move to a different area, your CSFP information may be shared with the new CSFP agency
- The CSFP provides referrals to health and social services that may help your family

Your pledge to CSFP

Honesty

- CSFP food benefits you and/or your children and you may not sell or trade them (the intention alone could be grounds for removal from the program)
- If the CSFP determines you have attempted to sell or had intention to sell any food benefits verbally, in print or online through any type of social media, you will be subject to disqualification from the Program
- You can enroll at only one CSFP agency at a time and may not receive benefits at more than one CSFP site at the same time
- You may not receive both CSFP and WIC benefits simultaneously
- ID cards are unique to you and are not to be changed/altere

Accurate Information

- Provide the most current and truthful information (CSFP staff may verify this information is correct)

Good Use of the Program

- Be courteous and respectful towards the CSFP staff
- Following the rules of the CSFP program is important to avoid being prosecuted, disqualified, and/or asked to repay the program

Protect your benefits

- Keep your CSFP ID card safe

Authorized Rep. Name: JASON SMITH

OK

Figure 6.5: Rights & Obligations Form

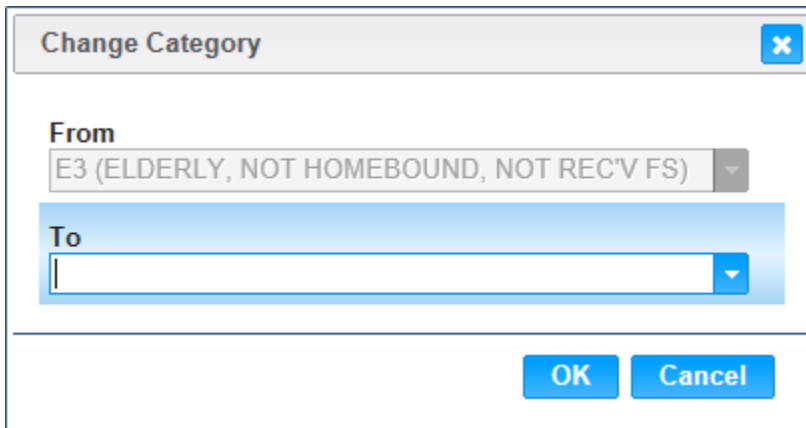
- **OK** – Closes the form
- **Signatures** – Redirects user to signature page to collect signatures
- **New Cert** – Initiates a new certification for a terminated client
- **Save** – Initiates save of the certification record
- **Reset** - Unsaved edits are cleared restoring the form to its previously unedited state.

Buttons After Save:

Print Reapply Form Print Rights & Obligations Signatures Category Change Extend Cert Terminate Cert Disqualify
Reinstate Cert New Cert Save Reset

Figure 6.6: Buttons After Save

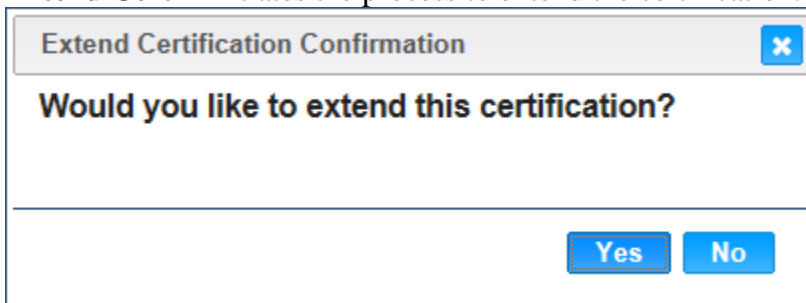
- **Category Change** – Selection initiates category change for certified client.



The dialog box is titled "Change Category" with a close button (X) in the top right corner. It contains two dropdown menus. The first, labeled "From", is currently set to "E3 (ELDERLY, NOT HOMEBOUND, NOT REC'V FS)". The second, labeled "To", is currently empty. At the bottom right, there are two buttons: "OK" and "Cancel".

Figure 6.7: Category Change

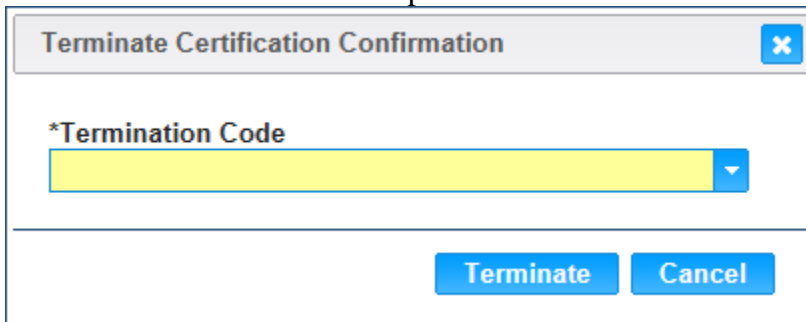
- **From** – Displays clients current category.
- **To** – Drop down list populated with categories.
- **OK** – Completes the category changes.
- **Cancel** – Closes the window with no action taken.
- **Extend Cert** – Initiates the process to extend the certification.



The dialog box is titled "Extend Certification Confirmation" with a close button (X) in the top right corner. It contains the text "Would you like to extend this certification?". At the bottom right, there are two buttons: "Yes" and "No".

Figure 6.8: Extend Certification Confirmation

- **Yes** – Completes the certification extension.
- **No** – Closes the window with no action taken.
- **Terminate Cert** – Initiates the process to terminate the certification.



The dialog box is titled "Terminate Certification Confirmation" with a close button (X) in the top right corner. It contains a dropdown menu labeled "*Termination Code" which is currently empty. At the bottom right, there are two buttons: "Terminate" and "Cancel".

Figure 6.9: Terminate Certification Confirmation

- **Termination Code** – Drop down list populated with termination values.
- **Terminate** – Completes the termination process
- **Cancel** – Closes the window with no action taken.
- **Disqualify** – Initiates the disqualification process.

Figure 6.10: Disqualification

- **Start Date** – Calendar field to enter disqualification start date. This field is mandatory.
- **End Date** – Calendar field to enter disqualification end date. This field is mandatory.
- **Disqualification Reason** – Drop down list populated with disqualification values. This field is mandatory.
- **Disqualify** – Initiates the disqualification process.
- **Cancel** – Closes the window and no action is taken.
- **Reinstate Cert** – Initiates the reinstate process for the certification.

Figure 6.11: Reinstate Certification Confirmation

- **Yes** – Completes the reinstatement of the certification.
- **No** – Closes the window and no action is taken.

Calculation(s):

- 1) The certification end date field is populated with a date six months from the current date.

Elderly	- LAST_DAY of ADD_MONTHS (SYSDATE, 5)
Migrant	- LAST_DAY of ADD_MONTHS (SYSDATE, 11)

Background Processes:

- 1) The system performs a three step save process when saving a new certification record:
 - a. First, it ensures all mandatory fields are populated with data. If not, the save process will stop and an error message will be thrown.

- b. Second, it ensures all fields have proper data entered (i.e. Fields that only accept numbers do not allow alphabetic characters to be saved). If not, the save process will stop and an error message will be thrown.
 - c. Third, it ensures all fields do not exceed the maximum character amount allowed. If not, the save process will stop and an error message will be thrown.
 - d. Fourth, after the other steps have been completed without issue, it successfully saves the page and adds the data to the database. The Client's certification record will be displayed in the certifications grid. The user will be able to edit the current certification record that day only.
- 2) Family's VoterRegDate will be cleared if is less than 120 days from sysdate.
 - 3) Client record will be updated to have recstatus = Active (A), Category set to current certification category.

7 DISTRIBUTION PAGE

This page is used to record the distribution of food boxes for a distribution site.

Navigation Path: CSFP Services / Distribution Page

ROMOC [Log Off] 02 - COCHISE COUNTY HEALTH DEPARTMENT / 02 - BISBEE WIC

Home Sys Admin Ops Mgmt WIC Services **CSFP Services** Scheduling Farmers' Market Finance Vendor Program Integrity Reports

Distribution

*Local Agency: 02 - COCHISE COUNTY HEALTH DEPARTMENT *Distribution Site: 02 - BISBEE WIC *Month: Nov *Year: 2014

Pickup Date:

Distribution Master List

Name	Date of Birth	Client ID	Category	Cert Start Date	Cert End Date	Pickup Date	Food Box <input type="checkbox"/>	Nut Ed <input type="checkbox"/>	Other <input type="checkbox"/>	Extend <input type="checkbox"/>
ADDRESS, TEST	9/3/1947	1021402651	E2	9/22/2014	8/31/2015	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
BELKIN, FRANK W	9/2/1920	1021402922	E2	10/30/2014	3/31/2015	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
BUG_33255, CHESTER	9/2/1939	1021402701	E3	9/25/2014	2/28/2015	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
BUG_33255, ROGER W	9/3/1935	1021402694	E2	9/24/2014	2/28/2015	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
BUG_34313, CARL W	9/3/1930	1021402736	E3	10/1/2014	9/30/2015	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
BUG_34313, CAROL W	9/3/1937	1021402737	E2	10/1/2014	3/31/2015	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
BUG_34313, IDA W	9/3/1939	1021402735	E2	10/1/2014	9/30/2015	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
BUG_34351, GAVIN W	9/3/1930	1021402828	E3	10/14/2014	3/31/2015	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
BUG_34415, JANE W	9/3/1947	1021402816	E3	10/15/2014	3/31/2015	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Scan History Display List Save Reset

Figure 7: CSFP Distribution Page

Fields:

- **Local Agency** – Drop down list populated with local agency values. This field is mandatory.
- **Distribution Site** – Drop down list populated with distribution site values. This field is mandatory.
- **Month** – Drop down list populated with the months of the year. This field is mandatory.
- **Year** – Drop down list populated with the current and previous year. This field is mandatory.
- **Pickup Date** – Date entry field.

Distribution Master List Grid:

- **Name** – Client name Last name, First name. This field is display only.
- **Date of Birth** – Client date of birth. This field is display only.
- **Client ID** – Client ID for the client listed on that line. This field is display only.
- **Cert Period** – Cert start and end date. This field is display only.
- **Pickup Date** – Date field entered by the user when clients picked up a food box.
- **Food Box** – Selection indicates a food box was distributed to that client. Selection will populate the Pickup Date in the grid. Selection of the checkbox will enable the Nut Ed and Extend checkboxes. Selection of the checkbox next to the label will select all checkboxes on the page.

- **Nut Ed** – Selection indicated nutrition education was given to that client. Selection of the checkbox next to the label will select all checkboxes on the page.
- **Extend** – Selection initiates the certification extension for that client for 6 months.

Buttons:

- **Scan History** – Selection redirects user to Scanned Documents page

Scan Title	Description	Scanned Date	Scanned By
CSFP DISTRIBUTION SCAN 3B	CSFP DISTRIBUTION SCAN 3B DESCRIPTION	11/1/2014	RPALERMO
CSFP DISTRIBUTION SCAN 1	CSFP DISTRIBUTION SCAN 1 DESCRIPTION	11/1/2014	RPALERMO
TESTING COLOR		10/29/2014	HPURDY
TESTING		10/29/2014	HPURDY

Figure 7.1: Scan History Page

- **Scan** – Redirects user to the scan page.
- **Save** – Initiates the save of scanned documents in the list.
- **Display List** – Selection initiates the search for eligible client based on the search criteria.
- **Save** – Selection initiates save of data entered in the grid.
- **Reset** - Unsaved edits are cleared restoring the form to its previously unedited state.

Calculation(s):

Month close out date is calculated by adding Close_Out_Days from f_controls table to the first day of the current month. If closeout date is not passed or user has a CSFP super user role, user can also edit previous month along with the current month data.

Background Processes:

- 1) If the extend button is checked (enabled for elderly clients), the system will extend client's certification six more months (one time only).

8 APPOINTMENTS PAGE

The Appointments page is used to view scheduled appointments, view scheduled group nutrition discussion appointments, view or add pending services, view appointment history, schedule an appointment, and schedule a group appointment for the client displayed in the active record.

Navigation Path: CSFP Services / Appointments page

The screenshot displays the 'Appointments' page for a client named Jason Smith. The sidebar on the left contains client details: LA/Clinic (BISBEE WIC), Family ID (140000010), Auth. Rep. Name (SMITH, JASON), Phone ((555) 122-1212), Client ID (2021402982), Client Name (SMITH, JASON), Date of Birth (1/31/1943), Age (71 yrs, 10 mos), Cert. Period (11/26/2014 - 10/31/2015), Category (E3), Term. Date (N/A), Due Date (N/A), Next Appt. (12/12/2014), Weeks PG (N/A), and Distribution Site (BISBEE WIC). The main content area is titled 'Scheduled Appointments' and shows an appointment for 12/12/2014 at 10:00 AM for 15 minutes. A table lists the appointment details: Client Name (SMITH, JASON), Cat (E3), Service (NEW CERTIFICATION), Column (CERTIFICATIONS), and Things to bring. Below the table are buttons for 'Reschedule' and 'Cancel Appointment'. The page also includes links for 'Find Appointment Availability' and 'Find Groups'.

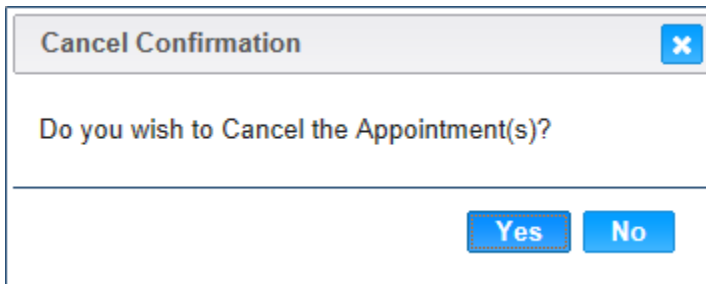
Appointment Date	Appointment Time	Client Name	Cat	Service	Column	Things to bring
12/12/2014	10:00 AM - 10:15 AM (15 Mins)	SMITH, JASON	E3	NEW CERTIFICATION	CERTIFICATIONS	

Figure 8: Appointments Page

Fields:

Scheduled Appointments:

- **Appointment Date** – Date of next appointment. This field is display only.
- **Appointment Time** – Time and duration of next appointment. This field is display only.
- **Client Name** – Name of client. This field is display only.
- **Cat** – Category of client. This field is display only.
- **Service** – Service type of the scheduled appointment. This field is display only.
- **Column** – Column name for the scheduled appointment. This field is display only.
- **Things to bring** – Items for the client to bring to the appointment. This field is display only.
- **Reschedule** – Redirects user to appointment scheduler
- **Cancel Appointment** – When selected will cancel the appointment.



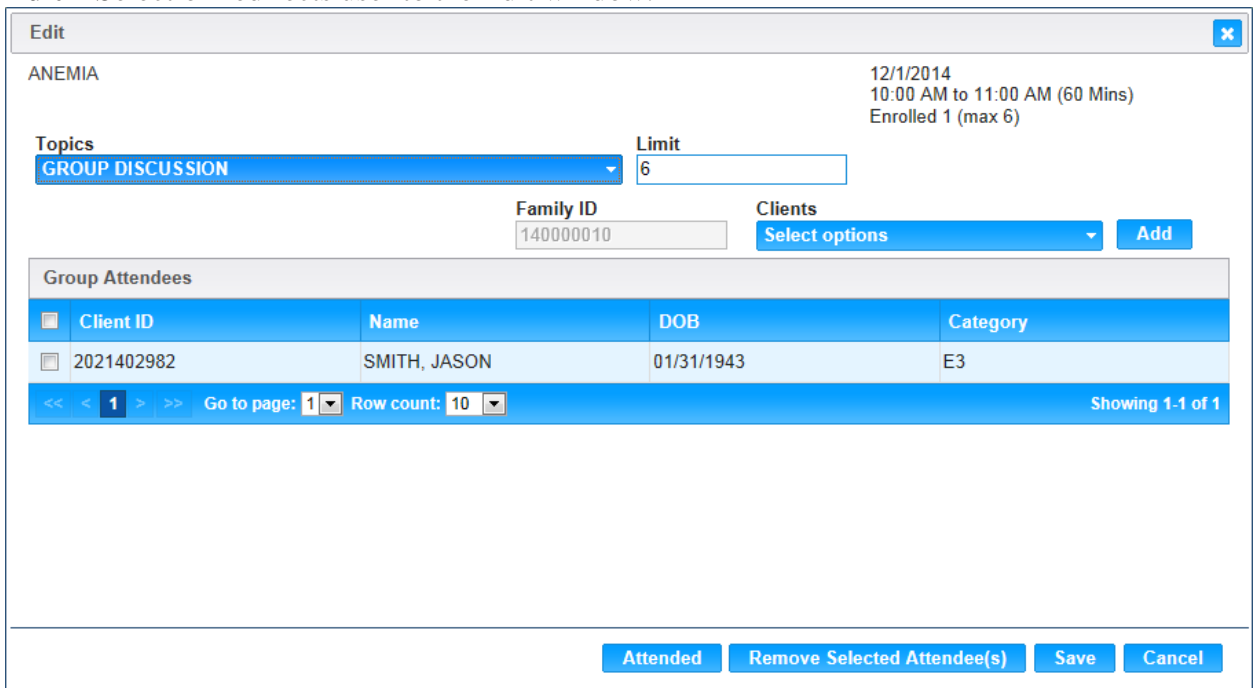
A dialog box titled "Cancel Confirmation" with a close button (X) in the top right corner. The main text asks, "Do you wish to Cancel the Appointment(s)?". At the bottom, there are two buttons: "Yes" and "No".

Figure 8.1: Cancel Confirmation

- **Yes** – Cancels the appointment.
- **No** – Closes the window and no action is taken.

Scheduled Group Nutrition Discussion Appointments:

- **Client ID** – Client ID for the scheduled appointment. This field is display only.
- **Name** – Name of the client. This field is display only.
- **DOB** – Date of birth of the client. This field is display only.
- **Cat** – Category of the client. This field is display only.
- **Edit** – Selection redirects user to the Edit window.



The "Edit" form for a group nutrition discussion appointment. It includes the following fields and controls:

- Topic:** A dropdown menu currently showing "GROUP DISCUSSION".
- Limit:** A text input field containing the number "6".
- Family ID:** A text input field containing "140000010".
- Clients:** A dropdown menu showing "Select options" and an "Add" button.
- Group Attendees:** A table with columns: Client ID, Name, DOB, and Category.

Client ID	Name	DOB	Category
2021402982	SMITH, JASON	01/31/1943	E3
- Navigation:** At the bottom of the table, there are controls for "Go to page: 1" and "Row count: 10", along with "Showing 1-1 of 1".
- Buttons:** At the bottom of the form, there are four buttons: "Attended", "Remove Selected Attendee(s)", "Save", and "Cancel".

Figure 8.2: Edit Group Nutrition Discussion

- **Topics** – Multi-select drop down list of group topics.
- **Limit** – Max number of class attendees.
- **Family ID** – Family ID for client. This field is display only.
- **Clients** – Multi-select drop down list of clients in the family.
- **Add** – Selection adds client(s) to Group Attendees grid.
- **Client ID** – Client ID for scheduled appointment. This field is display only.
- **Name** – Name of the client. This field is display only.

- **DOB** – Date of birth of the client. This field is display only.
- **Category** – Category of the client. This field is display only.
- **Attended** – Selection marks selected client(s) as having attended the group.
- **Remove Selected Attendee(s)** – Selection will remove selected client(s).
- **Save** – Initiates save of changes to the page.
- **Cancel** – Closes the window and no changes are made.

Pending Services:

- **Clients** – Drop down list of clients in the family.
- **Services** – Drop down list populated with services.
- **Active** – Selection for searching active/not active pending services.
- **Go** – Initiates search for pending services.
- **Client Name** – Name of the client. This field is display only.
- **Category** – Category of the client. This field is display only.
- **Gender** – Gender of the client. This field is display only.
- **Service** – Service selected for the client. This field is display only.
- **Duration** – Length of time needed for the appointment. This field is display only.
- **Things to bring** – List of items the client needs to bring. This field is display only.
- **Date** – Date the pending service entry was created. This field is display only.
- **Status** – Y/N indicator if the pending service is active. This field is display only.
- **Schedule** – Redirects the user to the appointment availability search page to schedule an appointment for the pending service.
- **Add** – Selection will display window to add a pending service.

The screenshot shows a modal dialog box titled "Add". It contains the following elements:

- *Client Name**: A dropdown menu with a yellow background.
- *Service**: A dropdown menu with a yellow background.
- Duration**: A text input field.
- Things to bring**: A blue button labeled "Select options".
- Buttons**: "Save" and "Cancel" buttons at the bottom right.

Figure 8.3: Add Pending Service

- **Client Name** – Drop down list populated with clients within the family. This field is mandatory.
- **Service** – Drop down list populated with types of services. This field is mandatory.
- **Duration** – Numeric text field for the duration of the appointment.

- **Things to bring** – Multi-select drop down list populated with items for the client to bring to the appointment.
- **Save** – Initiates the save of the new pending service.
- **Cancel** – Closes the window and no action is taken.

Appointment History (all fields are display only):

- **Client Name** – Name of client for the appointment.
- **Service/Group** – Service or Group name for the appointment.
- **Date** – Date of the appointment.
- **Time** – Time of the appointment.
- **Things to bring** – List of things to bring for the appointment.
- **Status** – Status of that appointment.
- **Walkin** – Y/N indicator if the appointment was a walk-in

Buttons:

- **Find Appointment Availability** – Redirects user to the Appointment Availability Search page.
- **Find Groups** – Redirects user to the Groups Availability Search page.

Calculation(s):

Background Processes:

9 NOTES PAGE

The Notes page is used to review or enter notes for clients in a family or enter a Staff Alert for the whole family.

Navigation Path: CSFP Services / Notes Page

ROMOC [Log Off](#) 02 - COCHISE COUNTY HEALTH DEPARTMENT / 02 - BISBEE WIC

Home Sys Admin Ops Mgmt WIC Services **CSFP Services** Scheduling Farmers' Market Finance Vendor Program Integrity Reports

Family Client Income Cert Distribution **Appts** **Notes** FMNP Issuance FMNP Void / Reissue

Notes

LA/Clinic
BISBEE WIC

Family ID
140000010

Auth. Rep. Name
SMITH, JASON

Phone
(555) 122-1212

Client ID
2021402982

Client Name
SMITH, JASON

Date of Birth 1/31/1943 Age 71 yrs, 10 mos

Cert. Period 11/26/2014 - 10/31/2015 Category E3

Term. Date N/A Due Date N/A

Next Appt. 12/5/2014 Weeks PG N/A

Distribution Site
BISBEE WIC

Date Client Note Type Created By

2021402982: SMITH, JASON

Date	Client	Note Type	Note	Created By
11/26/2014	2021402982 SMITH, JASON	PROGRAM EDUCATION	RIGHTS & OBLIGATIONS	ROMOC
11/26/2014	2021402982 SMITH, JASON	PROGRAM EDUCATION	RULES & REGULATIONS	ROMOC

<< < > >> Row count: 10 Showing 1-2 of 2

Add Search Reset

Figure 9: Notes page

Fields:

- **Date** – Calendar search field.
- **Client** – Drop down list populated with clients in the family.
- **Note Type** – Drop down list populated with note types.
- **Created By** – Drop down list populated with user names.

Notes Grid (all fields are display only):

- **Date** – Date the note was created.
- **Client** – Client ID and name for that note.
- **Note Type** – Note type for that note.
- **Note** – Text within the note.
- **Created By** – User name of who created that note.

Buttons:

- **Add** – Selection redirects user to the add note page.
- **Search** – Initiates a note search based upon the search criteria entered.
- **Reset** – Unsaved edits are cleared restoring the form to its previously unedited state.

Calculation(s): None

Background Processes: None

9.1 Add a Note

This page is used to add notes.

Navigation Path: CSFP Services / Notes Page / Add Button

The screenshot displays the 'Add Notes' interface. On the left sidebar, client details are listed: LA/Clinic (BISBEE WIC), Family ID (140000010), Auth. Rep. Name (SMITH, JASON), Phone ((555) 122-1212), Client ID (2021402982), Client Name (SMITH, JASON), Date of Birth (1/31/1943) with Age (71 yrs, 10 mos), Cert. Period (11/26/2014 - 10/31/2015) with Category (E3), Term. Date (N/A) with Due Date (N/A), Next Appt. (12/5/2014) with Weeks PG (N/A), and Distribution Site (BISBEE WIC). The main form area includes a '*Client' dropdown, a '*Note Type' dropdown, and a large '*Note' text area. At the bottom right, there are 'Save' and 'Reset' buttons. The top navigation bar shows the user is logged in as 'ROMOC' and the system is '02 - COCHISE COUNTY HEALTH DEPARTMENT / 02 - BISBEE WIC'.

Figure 9.1: Add Notes page

Fields:

- **Client** – Drop down list populated with clients in the family. This field is mandatory.
- **Note Type** – Drop down list populated with note types. This field is mandatory.
- **Note** – Free text field for the note. This field is mandatory.

Buttons:

- **Save** – Initiates the save of the new note.
- **Reset** – Unsaved edits are cleared restoring the form to its previously unedited state.

9.2 Edit a Note

This page is used to edit or review notes. No edits can be done to the note unless it has a Note Type of “Staff Alert”, then the Note Type can be updated.

Navigation Path: CSFP Services / Notes Page / Grid Edit Icon

The screenshot displays the 'Edit Notes' page. At the top, there is a navigation bar with the following tabs: Home, Sys Admin, Ops Mgmt, WIC Services, CSFP Services (highlighted), Scheduling, Farmers' Market, Finance, Vendor, Program Integrity, and Reports. Below the navigation bar is a 'Back to List' button. The main content area is divided into two sections. On the left is a sidebar containing client information: LA/Clinic (BISBEE WIC), Family ID (140000010), Auth. Rep. Name (SMITH, JASON), Phone ((555) 122-1212), Client ID (2021402982), Client Name (SMITH, JASON), Date of Birth (1/31/1943), Age (71 yrs, 10 mos), Cert. Period (11/26/2014 - 10/31/2015), Category (E3), Term. Date (N/A), Due Date (N/A), Next Appt. (12/5/2014), Weeks PG (N/A), and Distribution Site (BISBEE WIC). On the right is the main editing area, which includes a '*Client' dropdown menu (showing 2021402982: SMITH, JASON), a '*Note Type' dropdown menu (showing PROGRAM EDUCAT), and a large text area for the note content (showing RIGHTS & OBLIGATIONS). At the bottom right of the page are 'Save' and 'Reset' buttons.

Figure 9.2: Edit Notes page

Fields:

- **Client** – Name of the client for the note. This field is read only.
- **Note Type** – Note type for the note. This field is read only.
- **Note** – Text of the note. This field is read only.

Buttons:

- **Save** – This button is disabled. No action can be taken.
- **Reset** – This button is disabled. No action can be taken.